

MANUAL TRANSMITTAL

INTERNAL REVENUE SERVICE * Date of Issue:

November 11, 1966

Purpose

This Memorandum transmits revised text for IRM 1(20)00, Reports Management.

Removal and Insertion of Pages

Remove

Table of Contents 1(20)00 — 1(20)33.3
Text 1(20)10 — 1(20)19.25
Exhibits 1(20)10-1 — 1(20)10-8

Insert

Table of Contents 1(20)00 — 1(20)33.3
Text 1(20)10 — 1(20)19.25
Exhibits 1(20)10-1 — 1(20)10-8

Nature of Changes

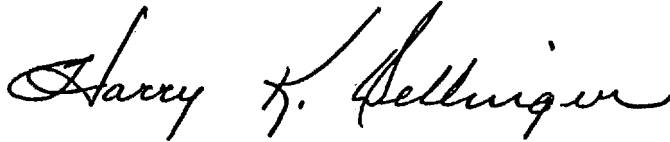
IRM 1(20)18.1 has been revised to incorporate the requirement from Manual Supplement 12G-19, dated April 22, 1965, that the Reports Division, in reviewing proposed issuances concerning reports, will consider the appropriateness of proposed effective dates and will note on Document

Clearance Record, Form 2061, the date by which, in its judgment, the issuance must be received in field offices to afford adequate lead time. Other portions of MS 12G-19 have been incorporated in IRM 1233.4 and 1254.5:(2).

The Table of Contents for IRM 1(20)00 and other pages of text for IRM 1(20)10 are included in order to effect incidental changes, and to change style and format of printing.

Effect on Other Documents

Manual Supplement 1(20)G-5, dated March 8, 1966, remains in effect supplementing IRM 1(20)10.



HARRY K. DELLINGER
Director, Reports Division

MT 1(20)00-11 (11-11-66) IR Manual
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TABLE OF CONTENTS

1(20)00	REPORTS MANAGEMENT	1(20)17.2	Assignment of Symbols
1(20)10	Reports Program	1(20)17.3	Composition of Symbols
1(20)11	Purpose, Scope and Objectives	1(20)17.4	Indicating the Report Symbol
1(20)11.1	Purpose and Scope	1(20)17.5	Reporting Requirements Lacking A Symbol
1(20)11.2	Objectives	1(20)18	Procedures and Records
1(20)12	Program Direction and Organization	1(20)18.1	National Office Clearance Procedures
1(20)12.1	Overall Direction	1(20)18.2	Field Office Procedures
1(20)12.2	Central Reports Management Officers	1(20)18.21	Clearance Procedures
1(20)12.3	Reports Management Officer Designations	1(20)18.22	Postreview Procedures
1(20)12.4	Organizational Framework	1(20)18.3	Program Records
1(20)12.5	Notification of CRMO and RMO Designations	1(20)18.31	Requiring Level Concept
1(20)13	Responsibilities	1(20)18.32	Case Files
1(20)13.1	National Office Reports Division	1(20)18.33	Recurring Reports Catalogs
1(20)13.2	Central Reports Management Officers	1(20)18.34	Program Records for Other Than CRMO's
1(20)13.3	Reports Management Officers	1(20)19	Program Evaluation
1(20)13.4	All Program Participants	1(20)19.1	Visitations
1(20)13.5	Early Collaboration	1(20)19.2	Reports Program Accomplishments (Report Symbol NO-D:R-1, Form 3030)
1(20)14	Reports Review	1(20)19.21	Purpose
1(20)14.1	General	1(20)19.22	Reporting Forms
1(20)14.2	Review of New or Revised Reporting Requirements	1(20)19.23	Period Covered and Due Dates
1(20)14.3	Periodic Reviews	1(20)19.24	Forwarding Reports
1(20)15	Reports Studies	1(20)19.25	Preparation Instructions—Form 3030
1(20)16	Reports Program Basic Operating Principles and Systems	1(20)20	Reports Standards
1(20)16.1	The Requiring Level Principle	1(20)21	Presentation Standards
1(20)16.2	Operating Systems	1(20)21.1	Standard Stub for Presenting Data by Region and District
1(20)16.3	Reports Clearance System	1(20)30	Analysis of Current Operating Reports
1(20)16.31	General	1(20)31	Purpose and Scope
1(20)16.32	Standard Operating Rule	1(20)32	Concept and Objectives of the Program
1(20)16.33	Definition	1(20)33	Responsibilities
1(20)16.34	Clearance Limited by Organizational Relationships	1(20)33.1	General
1(20)16.35	Exemptions	1(20)33.2	Assistant Commissioner (Data Processing)— Reports Division
1(20)16.36	Clearance Questions	1(20)33.3	Other Offices of Assistant Commissioners
1(20)16.4	Reports Postreview System		
1(20)17	Report Symbols		
1(20)17.1	The Constant Symbol Concept		

1(20)00

Reports Management

1(20)10

REPORTS PROGRAM

1(20)11 Purpose, Scope and Objectives

1(20)11.1 PURPOSE AND SCOPE

Reports are vital to the Internal Revenue Service. Every reporting requirement is a commitment of manpower and materials. It is therefore essential that reports and reporting systems meet our genuine needs at the lowest possible cost. An active continuing Service-wide Reports Program is therefore established for all levels of the Service. The program provides for the coordination and review of all reports, and for central program direction at major levels. Further, to promote the program in depth, and to benefit from individual experience and ability, maximum participation by Service personnel at all levels is encouraged. The terms "district office" and "district" as used in this Manual Section apply to both district and service center reports programs.

1(20)11.2 OBJECTIVES

(1) The overall objective of the Reports Program is a continuing aim to improve the quality and to reduce the cost of reports. Inherent in this aim are the following specific objectives:

- (a) Meaningful and useful information for management's needs;
- (b) Appropriate and consistent data, clearly presented;
- (c) Reporting simplicity, including practical limits on data reported, frequency, and distribution;
- (d) Maximum timeliness; realistic due dates;
- (e) Reporting that compares progress with stated objectives;
- (f) Integrated reporting systems which provide data commensurate with needs at all levels;
- (g) Mechanization of reports, as applicable and economical;
- (h) Clear and adequate reporting instructions; and
- (i) Effective reporting at minimum cost.

1(20)12 Program Direction and Organization

1(20)12.1 OVERALL DIRECTION

The Commissioner and his National Office staff direct the overall program. Within overall policy and programs, Regional Commissioners and Directors of Districts and Service Centers are responsible for effective reports programs for their respective organizations.

1(20)12.2 CENTRAL REPORTS MANAGEMENT OFFICERS

At each of the three organizational levels, National, regional, and district, there will be one Central Reports Management Officer (CRMO) and an alternate. The CRMO for the National Office is the Director, Reports Division. The duties of the CRMO's will include surveys of reporting requirements in cooperation with operating elements, collaboration with top officials regarding the Reports Program, and coordinating the development of data collection and reporting systems. It is therefore desirable, particularly at the regional and district central points, that CRMO's possess the broadest management skills and that they be in the most favorable position to deal effectively with all elements of their organization. At the regional level the CRMO should be a management analyst on the staff of the Assistant Regional Commissioner (Administration). At the district level, it is suggested that either the Assistant District Director or the Chief, Administration Division, be designated as the CRMO. Districts may recommend another CRMO designation if warranted by particular circumstances. Such a proposal shall be referred to the regional office for approval.

1(20)12.3 REPORTS MANAGEMENT OFFICER DESIGNATIONS

At the National Office level, a Reports Management Officer (RMO) and an alternate will be designated for each Office of Assistant Commissioner and for each of its divisions, or optionally, for either of these echelons. In the field, such officers will be assigned to each Assistant Regional Commissioner, and for each district division. Duties of designees generally will be part-time and will include collaboration and coordination with the CRMO at their respective organizational levels in all reports program matters.

1(20)12.4 ORGANIZATIONAL FRAMEWORK

The Service-wide Reports Program will be developed and administered within existing organizational lines. The chart on the following page illustrates the framework to carry out the program.

1(20)12.5 NOTIFICATION OF CRMO AND RMO DESIGNATIONS

The names and titles of each CRMO and RMO and their alternates designated and any subsequent change shall be forwarded to the next higher program level as changes occur.

MT 1(20)00-11 (11-11-66) IR Manual
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1(20)12.5

REPORTS PROGRAM

Item	National Office	Regional Office	District Office and Service Center
Program responsibility	Assistant Commissioner (Data Processing)	Assistant Regional Commissioner (Administration)	Assistant Director or Chief, Administration Division
Program direction and operation	Reports Division (National Office Central RMO)	Management Analyst on Staff of ARC (Administration) (Regional Central RMO)	Assistant Director or Official of Administration Division (District Central RMO)
Program collaboration and coordination	RMO's for Ass't Commissioners and/or Division Directors	RMO's for Assistant Regional Commissioners	RMO's for Division Chiefs
Other program participation	Supervisors	Supervisors	Supervisors

1(20)13 Responsibilities**1(20)13.1 NATIONAL OFFICE REPORTS DIVISION**

(1) The National Office Reports Division will:

- (a) Plan and direct the overall Reports Program;
- (b) Study reporting systems and methods and, in cooperation with other organizational elements, develop integrated and other reporting systems and procedures;
- (c) Coordinate Service-wide reporting, both manual and mechanized;
- (d) Establish and disseminate guides and standards;
- (e) Provide centralized manual reports compilation, to the extent practicable, for the National Office;
- (f) Appraise effectiveness of the Service-wide program;
- (g) Perform for the National Office, those CRMO functions described in IRM 1(20)13.2;
- (h) Approve changes in bases of units of measurement for the Commissioner and Deputy Commissioner except in those instances considered important enough to be brought to the attention of these officials; and
- (i) Maintain central file of reports published at the National Office level.

1(20)13.2 CENTRAL REPORTS MANAGEMENT OFFICERS

(1) Central Reports Management Officers will:

- (a) Coordinate reports and reporting systems;
- (b) Conduct periodic reports reviews;
- (c) Provide reporting requirements analysis services;
- (d) Review new and revised reports and assign report symbols as appropriate;

(e) Maintain records on Reports Program and accomplishments; and

(f) Maintain and publish a catalog of recurring reports covered by the Reports Program.

1(20)13.3 REPORTS MANAGEMENT OFFICERS

(1) Reports Management Officers will:

- (a) Serve as the coordination and communications link between the CRMO and the organizational element of the RMO; and
- (b) Collaborate with the CRMO in carrying out the Reports Program as it affects the activity of the RMO.

1(20)13.4 ALL PROGRAM PARTICIPANTS

(1) Program Participants will:

- (a) Analyze and evaluate reporting requirements;
- (b) Identify data needs; and
- (c) Recommend improvements.

1(20)13.5 EARLY COLLABORATION

The reports management function can be exercised more effectively when the resources of reports management officials are combined with those of operating officials early in the development of plans and programs for reports. Offices initiating reporting requirements are therefore encouraged to consult their RMO's and CRMO's, as appropriate, early in the formulative period of such activity to achieve the benefits of collaborative effort.

1(20)14 Reports Review**1(20)14.1 GENERAL**

The Reports Program provides for reviews of reports at all levels within normal channels and relationships. These reviews are essential for an effective program; every opportunity for improvements should be fully exploited.

REPORTS PROGRAM

1(20)14.2 REVIEW OF NEW OR REVISED REPORTING REQUIREMENTS

(1) Each proposal to establish a new reporting requirement, or to revise an existing one, should, to the maximum extent practicable, be reviewed jointly by the originator and the Reports Management Officer for his area. Consideration should be given to pretesting requirements when warranted. Also new or revised requirements should be re-evaluated within a reasonable time after submission of the first report.

(2) Central Reports Management Officers shall be focal points for coordinating requests from sources outside the Service for information or data involving two or more Activities and available in reports as defined in IRM 1(20)16.33, 1(20)16.34, and 1(20)16.35. Exempt from this requirement are requests for information contained in reports or releases already disseminated to the public. However, management officials are responsible for appropriate coordination with the Central Reports Management Officer of replies to such requests and to requests for information contained in reports under the Program involving only one Activity. Copies of such replies shall be sent to the Central Reports Management Officer.

1(20)14.3 PERIODIC REVIEWS

Requirements for recurring reports shall be reviewed periodically at each requiring level to determine the economy and effectiveness of all reporting, and to ensure that any adjustments, or opportunities for improvement, are not overlooked. Staggering these reviews is recommended to permit maximum participation by management officials, Reports Management Officers and other program participants. Suggested periodic review procedure is contained in Reports Improvement Guide (Exhibit 1(20)10-5).

1(20)15 Reports Studies

(1) Complete studies in depth of reporting requirements will give the Service the best value for its reports program dollar. All such studies should be coordinated with existing studies so that the Service moves constantly and systematically towards its reports program objectives.

(2) Studies of reporting requirements should be conducted at any level where there are true opportunities to simplify the system, improve data quality and timeliness, and reduce cost. Groups of related reporting requirements will usually be studied on a joint basis by the functional office which originated the requirements and the Central Reports Management Officer at that level. Such studies may frequently require the employment of a task force to complete the project within practical time limits.

1(20)16 Reports Program Basic Operating Principles and Systems**1(20)16.1 THE REQUIRING LEVEL PRINCIPLE**

(1) As a practical matter the requiring level is in the best organizational position to review and fully judge

the benefits or shortcomings of reports. Under this concept, the National Office, regional offices and district offices will publish a catalog of, maintain case files on, study and improve those reports they require, including those that constitute feeder reports at lower levels. This means that an office is a requiring level when it originates a reporting requirement, requires a feeder report not specified by higher level, or modifies specifications for a feeder report required by a higher level in a manner which increases the workload.

(2) The requiring level basis for operating the IRS Reports Program does not preclude any preparing offices from making recommendations for the improvement of reports, to solve preparing office problems, to improve data quality, or to reduce the cost of reporting. Recommendations for improvement should be encouraged and sought by requiring offices.

1(20)16.2 OPERATING SYSTEMS

(1) The Reports Program should be operated under one of two prescribed systems. They are the Clearance System and the Postreview System. In the National Office, the Reports Program will be operated under the Clearance System. Each region will determine which of the two systems it will use in the regional office and its respective district offices. The region will notify the Director, Reports Division (D:R), of any subsequent change in its selection.

(2) The operating system should provide a means for attaining improved reporting at a minimum of cost and for documenting the reporting workload. Reports should be appraised against the specific objectives stated in IRM 1(20)11.2 to produce the best possible reporting for management and operating needs.

1(20)16.3 REPORTS CLEARANCE SYSTEM**1(20)16.31 General**

Under the Reports Clearance System, reports are reviewed and cleared prior to the issuance of requirements for their preparation.

1(20)16.32 Standard Operating Rule

In general, the collaborative effort between the requesting office and reports management officials should result in appropriate clearance of the reporting requirement. In those instances where differences exist between the CRMO and the office originating the report which cannot be resolved, a memorandum covering the facts involved will be prepared by the office of the CRMO and submitted to the next higher line officials over the originating office for review and consideration. In line with the principle of operating the Reports Program on a decentralized basis, such referrals will be made within each major level only (National Office, region, district).

MT 1(20)00-11 (11-11-66) IR Manual
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1(20)16.32

REPORTS PROGRAM

1(20)16.33 Definition

(1) In general, reports to be cleared shall include any data in written, printed, or published form transmitted on either a one-time or recurring basis from one organizational element to another providing information to plan programs or operations; manage manpower, money, or materials; measure, evaluate, or interpret performance; or provide data for publication.

(2) For the purpose of this definition, one-time reports are interpreted to mean one-time requests for information or data from all offices at the same level (i.e., region, assistant regional commissioner, district, division, branch office, group, etc.), or one-time reports prepared for dissemination to all offices at the same level, in a particular organizational or Activity complex. Regional offices may, however, make the coverage of one-time reports more comprehensive by amending this definition to include additional types of one-time reports which will be subject to the reports clearance system.

1(20)16.34 Clearance Limited by Organizational Relationships

(1) Reports subject to the clearance system as defined in IRM 1(20)16.33 are limited to those described for the following organizational relationships at each of the major levels:

(a) National Office CRMO Clearance

1 Any report required of or requested by the National Office and which crosses National Office organizational lines at the division level or above.

2 Any report requested by the National Office and which is a requirement for field reporting at any level.

3 Any report prepared by the National Office for dissemination in the National Office (other than intra-division) or to the field.

4 Any report prepared by a service center, as the processing or compiling office in a mechanized reporting system, for dissemination outside the center.

(b) Regional Office CRMO Clearance

1 Any report requested by the region and which crosses regional office organizational lines at the Assistant Regional Commissioner level or above, except for the Assistant Regional Commissioner (Administration) where clearance is required for any report crossing at the branch level or above.

2 Any report requested by the region and which is a requirement for district office reporting at any level, or is a requirement for regional branch office reporting.

3 Any report prepared by the region for dissemination in the regional office, to district offices, to regional branch offices, or to district local offices.

(c) District Office CRMO Clearance

1 Any report requested by the district and which crosses district office organizational lines at the section

level or above, or is a requirement for local office or group supervisor reporting.

2 Any report prepared by the district for dissemination to district elements down through the group supervisor.

1(20)16.35 Exemptions

(1) The definition cited in IRM 1(20)16.33 completely excludes from the clearance system those documents that are a part of a basic work process as contrasted to those documents that tell about the function, or about a part of the function. Types of documents specifically exempt from the clearance system include:

(a) Official reports of meetings or conferences.

(b) Official reports of survey or investigation by administrative bodies established for that purpose, such as Internal Audit Reports and Internal Security Investigation Reports.

(c) Formal reports of findings, recommendations, or actions prepared by committees or boards appointed to inquire into and report on a particular matter. Recurring reports, however, initiated by such committees or boards to obtain data required for their work are not exempt under this provision.

(d) Comments and/or concurrences as part of routine clearance of proposed action, requisitions, or publications.

(e) One-time recommendations, suggestions, or evaluations as to plans, policies, programs, agenda or procedures and official employee suggestions.

(f) Reports pertaining to the investigation of specific cases, such as tax, firearms, etc.

(g) Feeder reports prescribed by National Office, regions, or districts for preparation anywhere below their respective levels are exempt from clearance systems below the requiring level.

(h) Administrative operating documents such as travel vouchers, requisitions, bills of lading, personnel action forms, equipment receiving and inspection reports, etc. The exclusion covers only individual operating documents. Reports concerning progress in processing the documents, such as number prepared, number pending, etc., are not exempted.

1(20)16.36 Clearance Questions

Any question as to the determination of whether a document is subject to the reports clearance system should be referred to the respective CRMO for resolution.

1(20)16.4 REPORTS POSTREVIEW SYSTEM

The reports included in the Postreview System will be the same as those which would have been covered had a Clearance System been adopted, as defined in IRM 1(20)16.33, 1(20)16.34, and 1(20)16.35.

1(20)17 Reports Symbols

1(20)17.1 THE CONSTANT SYMBOL CONCEPT

A constant symbol is desirable to associate all reporting in a chain with the basic reporting requirement at the

MT 1(20)00-11 (11-11-66) IR Manual

1(20)16.33

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REPORTS PROGRAM

**(1(20)17.1 THE CONSTANT SYMBOL CONCEPT—
Cont.)**

original requiring level. For example, feeder reports prescribed by the National Office and flowing from a district office to a regional office, will bear the same symbol as that of the report to be submitted by the region to the National Office. However, a feeder report which includes data over and above that called for in a basic reporting requirement should bear a symbol representing the requiring level that specified the additional data. Forms bearing symbols in conflict with this constant symbols concept should be corrected when next reprinted.

(1(20)17.2 ASSIGNMENT OF SYMBOLS

If a Clearance System is in effect, symbols should be assigned by the CRMO to all recurring reports cleared. In a Postreview System, symbols should be assigned either by the CRMO or the office RMO to all recurring reports before the requirement is issued. In the regional program, symbols may be assigned to one-time reports at the option of each region.

(1(20)17.3 COMPOSITION OF SYMBOLS

A report symbol consists of a prefix indicating the level at which the report was cleared, the organizational designation of the requiring activity, and the numerical designation of the report, assigned consecutively. The organizational designation of the requiring activity should be set apart by hyphens from the clearance level and numerical designations, as in the report symbol "NO-CP:AT-15." This symbol identifies the 15th report cleared for the Alcohol and Tobacco Tax Division, Assistant Commissioner (Compliance), at the National Office level. One-time reports should be further identified by the addition of the letters "OT" (standing for one-time) in parentheses as a suffix to the report symbol.

(1(20)17.4 INDICATING THE REPORT SYMBOL

Reports under the program should be identified by reports symbols in reporting instructions and in reports submitted accordingly. In reporting instructions, the symbol should appear in parentheses immediately after the first mention of the report title. Forms and other formats used in reporting should show the reports symbol in the upper right corner of the format. On narrative reports, the title of the report including the symbol should be shown as the subject of the narrative report document.

**(1(20)17.5 REPORTING REQUIREMENTS LACKING
A SYMBOL**

Through an oversight, an office might receive a request for a new or revised reporting requirement which does not show a symbol. All such requests should be referred to the CRMO at the level of the requesting office. Concurrently, the recipient of the request should comply with the reporting instructions.

(1(20)18 Procedures and Records**(1(20)18.1 NATIONAL OFFICE CLEARANCE
PROCEDURES**

(1) *General*—Offices initiating reporting requirements subject to clearance are encouraged to consult their RMO and CRMO early in the development of these requirements to achieve the benefits of collaborative effort.

(2) The Requiring Office:

(a) Prepares in duplicate Form 2951, Reports Clearance (Exhibit 1(20)10-1) for each proposal for a new or revised reporting requirement.

(b) Attaches draft of report format or forms and related instructions if required; draft of requiring directive, and any other material pertaining to the reporting requirement.

(c) Ensures the establishment of realistic effective and response dates that provide adequate lead time for proper field implementation.

(d) Reviews proposal with its RMO. The Reports Improvement Guide, (Exhibit 1(20)10-5), particularly the Reports Review Guide check list on Form 2996 (Exhibit 1(20)10-6) are valuable tools for assisting in the review.

(e) Forwards the reports package to the CRMO.

(3) Central Reports Management Officer:

(a) Reviews the reporting requirement and related directives and instructions, consulting if necessary the requiring office and its RMO. In the review of requests for one-time reports, special consideration will be given to circumstances which make it necessary to obtain data expeditiously. Considers the appropriateness of proposed effective dates and notes on the Document Clearance Record, Form 2061, the date by which, in his judgment, the issuance must be received in field offices to afford adequate lead time.

(b) Assigns the report symbol after clearance and any necessary coordination with other offices.

(c) Enters the assigned report symbol on both copies of Form 2951, returning one copy to the requiring office RMO.

(4) *Discontinuance of Reports*—Requiring offices wishing to discontinue a report should coordinate the proposal with the CRMO. Form 2951, Reports Clearance, need not be prepared in such cases, but a statement of the cause for discontinuing the report should accompany the written requirement.

(5) *Transmitting Material on Cleared Reports to the CRMO*—Normally, reporting requirements will be expressed in internal management documents, and copies of the directive initiating, revising, or rescinding the report will thus be available to the CRMO through the normal distribution pattern. In those cases where it is impracticable to follow this procedure, requiring offices

REPORTS PROGRAM

(1(20)18.1 NATIONAL OFFICE CLEARANCE PROCEDURES—Cont.)

should forward copies of the final directives, instructions, and forms to their CRMO.

1(20)18.2 FIELD OFFICE PROCEDURES

1(20)18.21 Clearance Procedures

Regions and districts operating under the clearance system should follow the same procedures as outlined for the National Office in IRM 1(20)18.1.

1(20)18.22 Postreview Procedures

(1) *General*—Any Postreview System adopted by a region should be adequate to cover the basic and specific objectives of the Reports Program. It should include the same reports which would be covered in a clearance system.

(2) *Joint Review by Originator and Office RMO*—A joint review of new and revised reporting proposals by the originator of the report and the RMO in his area is especially recommended under a Postreview System. The Reports Review Guide, Form 2996, is useful in such reviews to ensure that all important points are covered.

(3) *Postreview Steps*—The originator of a reporting requirement should obtain a report symbol from his RMO or CRMO before releasing the requirement. The symbol should be used in the reporting directive, instructions, and forms used for obtaining the report. Symbols may be assigned to one-time reports at the option of each region. The originating office should send a copy of the reporting directive, forms used in the procedure and any related material to the CRMO as soon as the requirement is issued. The CRMO should review the material as early as practicable and make any suggestions for improvement in the method of reporting. Form 2951, Reports Clearance, is suggested for use by the CRMO to document the post-review.

(4) *Discontinuance of Reports*—Requiring offices should notify the CRMO of any reporting requirements in the system which they discontinue.

1(20)18.3 PROGRAM RECORDS

1(20)18.31 Requiring Level Concept

Recordkeeping practices for the Reports Program should follow the requiring level concept described in IRM 1(20)16.1.

1(20)18.32 Case Files

A case file should be established for each recurring report. The case file should include Reports Inventory or Reports Clearance forms, sample of the report form, copies of directives or instructions, Reports Review Guide worksheets, correspondence about the report and related material.

1(20)18.33 Recurring Reports Catalog

(1) The National Office, each regional office and each district office should publish a reports catalog. Form 2993, Reports Catalog (Exhibit 1(20)10-2) is available for this purpose. Reports should be listed in groups by Activity. Each new group should start a new page. When a region or district requires feeder reports in order to comply with a higher level reporting requirement, the catalog should relate the regional or district feeder report to the higher level reporting requirement. This can be done by showing the higher level report symbol in the "Office Use" column of the Reports Catalog.

(2) The National Office Reports Catalog (Document No. 5427) is distributed to National, regional and district offices. Regional office catalogs should be distributed within the regional office and to district offices. The Reports Catalog transmittal should indicate that reports included are limited to recurring reports required by the level issuing the catalog, and to those reports subject to the definition in IRM 1(20)16.33, 1(20)16.34 and 1(20)16.35. CRMO's should ask a sampling of offices to verify the catalog.

(3) One copy of each catalog issued by regional offices should be forwarded to the National Office Reports Division where the catalog will serve as a planning aid.

(4) The National Office, each regional office and each district office should maintain a reports catalog file, consisting of a master catalog for its level plus the last issue of higher level catalogs, as appropriate. The master Reports Catalog should be used to record new reports or revisions, assign symbols and provide a revised copy for publication.

1(20)18.34 Program Records for Other than CRMO's

Reports program records to be maintained by other than Central Reports Management Officers are not designated. Preparing offices may want access to a reports catalog to flag reports they are expected to prepare. The last column in the catalog format can be used for such notations.

1(20)19 Program Evaluation

1(20)19.1 VISITATIONS

The National Office Reports Division will evaluate the total program through a series of visitations at reasonable intervals. Assistant Regional Commissioners (Administration) and Assistant District Directors (or Chiefs, Administration Division) are responsible for developing systems to evaluate the Reports Programs under their respective jurisdictions. The Reports Program Evaluation Profile used by the National Office on field visitations is shown as Exhibit 1(20)10-4. This profile may prove helpful in developing an appraisal device for use by regions in their visitation program.

REPORTS PROGRAM

1(20)19.2 REPORTS PROGRAM ACCOMPLISHMENTS (REPORTS SYMBOL NO-D:R-1, FORM 3030)

1(20)19.21 Purpose

To effectively measure progress, and to plan and coordinate the Reports Program at their level, those responsible for the program will need periodic reports of accomplishments.

1(20)19.22 Reporting Forms

Regional offices should report accomplishments on Form 3030 (Exhibit 1(20)10-3). This form should also be used by districts in reporting feeder information to regional offices.

1(20)19.23 Period Covered and Due Dates

Reports will cover semi-annual periods ending June 30 and December 31 of each year. To meet various management needs, the consolidated regional report should arrive in the National Office by no later than the first workday

after the close of the reporting period. It will be necessary to establish a cutoff date prior to the end of the reporting period to meet the due date. District office feeder reports should be made available to the regional offices by the 15th workday of June and December, to provide sufficient time for the region to prepare its consolidated report for forwarding to the National Office.

1(20)19.24 Forwarding Reports

Consolidated regional reports, in the original only, should be submitted to the Director, Reports Division, National Office, Attention: D:R.

1(20)19.25 Preparation Instructions—Forms 3030

The report format has been designed to be self-balancing. Part I, provides for an opening recurring reports inventory, the application of inventory transactions during the report period, and an ending recurring reports inventory. Part II deals with one-time reporting activities during the report period. Specific instructions for each report item is given on the reverse of FORM 3030.